

*(Page 1) SBRS Change of Beneficiary Form*

**In order for your beneficiary to be eligible for a benefit, this form must be filed with the Boston Retirement Board prior to your death.**

*Boston Retirement Board, 1 City Hall Square - Room 816, Boston, Massachusetts 02201 (617) 635-4311*

*This form directs the Boston Retirement Board to pay the money you have contributed to the retirement system to your named beneficiaries in the event of your death.*

**Complete both pages of this form and answer all questions.**

**Your signature must be witnessed by a competent adult who is not your beneficiary.**

*Please note:*

- Payments covered by this form include:  
**Before your retirement:**
  1. The payment of a refund (the total deductions and interest credited to your account in the annuity savings fund at the date of your death).**Following your retirement:**
  1. The payment of any cash refund due at your death if your retirement was elected under Option (B).
  2. The payment of any prorated monthly amount due at your death if your retirement was elected under either Option A or Option B. Designation of an Option C survivorship allowance beneficiary is made at the time of retirement on the Option Selection Form and cannot be changed.
- You may change your beneficiary(s) at any time.
- You may change beneficiaries by filing a new blank form with this office.
- Incomplete forms will be returned to you by mail.
- Guardianship papers must be submitted for minors before the Board can issue any funds to them.
- You may also designate survivorship beneficiary to receive pension benefits in the event of your death prior to retirement. A survivorship beneficiary is limited to a spouse, former spouse who has not remarried, child, father, mother, sister or brother.

**Ask for an Option D Beneficiary Form.**

**Signature is required on page 2**

**SBRS MEMBER INFORMATION**

Name of Member: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Date of Birth \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

*Member's Home Address:* \_\_\_\_\_

**(Page2) SBRS Change of Beneficiary Form**

**In order for your beneficiary to be eligible for a benefit, this form must be filed with the Boston Retirement Board prior to your death.**

**Name:** \_\_\_\_\_ **Social Security #:** \_\_\_\_\_

**Lump Sum Beneficiary(ies):** I hereby instruct the Boston Retirement Board to pay any refund of my account upon my death to the following individuals or entities. *(The total of beneficiary proportions must equal 100%.)*

<b>I.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

<b>II.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

<b>III.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

<b>IV.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

**Contingent Lump Sum Beneficiary(ies)** In the event that a lump-sum beneficiary, above, predeceases me, pay as indicated below. *(The total of beneficiary proportions must equal 100%.)*

<b>I.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

<b>II.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

<b>III.</b>	Name Of Beneficiary	Social Security	Address Of Beneficiary	Relationship	Date Of Birth	Percentage
	_____	_____	_____ _____	_____	_____	_____

**Your signature must be witnessed by a competent adult who is not your beneficiary.**

Member's Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_

Name of Witness (print): \_\_\_\_\_

Home Address: \_\_\_\_\_

Witness Signature: \_\_\_\_\_ Date Signed: \_\_\_\_\_

The assigned benefit to any named beneficiary who predeceases you will be paid to your estate unless you instruct otherwise.